

Oracle® Order Capture

Implementation Guide

Release 11i

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Part No. A86137-02

This document provides general descriptions of the set up and configuration tasks required to implement the Oracle Order Capture successfully.

Dependencies

Oracle Order Capture requires that the following related products and components be installed and implemented:

- Oracle Accounts Receivable – for support of Taxes and Customer definitions
- Oracle Inventory – for Items and Reservations
- Oracle Bill of Materials – for the bills of materials associated with Items
- Oracle Configurator – for the configurator URL, if Oracle Configurator is used
- Oracle Order Management – for support of booking an order
- Oracle iPayment
- Oracle Advanced Pricing – for support of prices and discounts
- Oracle Service Contracts
- Oracle Contracts Core – for support of templates

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*

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- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table:

Related Documentation

Document	Purpose
<i>Oracle Applications, Product Update Notes, Release 11i</i>	Contains information about new product features and functions for the various Oracle applications
<i>Installing Oracle Applications, Release 11i</i>	Documents the Rapid Install installation process
<i>Implementing CRM Applications</i>	Contains post-installation information on various CRM modules
<i>Oracle CRM Foundation Components Concepts and Procedures</i>	A printed compilation of the Oracle Foundation online help system
<i>Oracle CRM Foundation Technical Reference Manual</i>	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- 11i Overview of CRM Foundation, Course Description ID 8831

Setting Up Oracle Order Capture

The following steps are required to set up Order Capture:

Steps

1. [Setting Up Quote Status and Quote Status Transitions](#) in the Quote Status Setup window
2. [Setting Up Lookup Codes](#) in the Quick Codes window
3. [Setting System Profile Options](#) in the Personal Profile window

Guidelines

Mandatory lookup codes are marked with an asterisk on the table of [Oracle Order Capture Lookup Codes](#).

Mandatory profile options are marked with an asterisk on the table of [Oracle Order Capture System Profile Options](#).

The ASO: Configurator URL profile option is mandatory only if you want the Configurator feature.

The ASO: Quote Conversion Type profile option is mandatory if you use multiple currencies.

Setting Up Quote Status and Quote Status Transitions

Use this procedure to perform the following tasks:

- Add new quote statuses
- Set up quote versioning
- Enable or disable existing quote statuses
- Set up the allowable status changes, or transitions, for each status

Quote status identifies how close a quote is to an order and determines whether a user can modify a quote and whether or not the application creates a new version if changes are made.

Oracle Order Capture is delivered with predefined quote statuses. You can define new quote statuses or modify the pre-defined statuses. Users need Quote Statuses to create quotes. See the online help for an explanation of Quote Status.

Prerequisites

To perform these tasks, you must be logged in under the Order Capture Sales Manager responsibility.

Steps

1. Navigate to the Quote Status Setup window.
2. If you want to add a new quote status, then:
 - a. In the Quote Statuses region, select a blank entry line or a line below which you wish to insert the new entry.
 - b. Enter the status code. This is the internal name and is not be seen by the user.
 - c. Enter the status name and status description. These are displayed in the list of values for users.
 - d. If you want the new status to create a version when the user saves a quote, then check the **Auto Versioning** check box.

- e. If you wish to enable a user to make changes to the quote, to add new quote lines or to modify prices, for instance, then check the **Update Allowed** check box.
 - f. If you wish to set time limits when this new status is available, then enter dates in the Effective From and Effective To fields.
 - g. Click **Save** on the toolbar.
3. If you wish to set up the rules that determine the permitted statuses a user can select for a particular status, then:
- a. In the Quote Statuses region, select the status you wish to set up.
 - b. In the Allowed Transition to Status region, use the Code list of values to select an allowable transition status.
 - c. Repeat the previous step for each permitted transition status.
 - d. If you wish to disable an existing status, then uncheck the **Enabled** box.
 - e. Click **Save** on the toolbar.

Setting Up Lookup Codes

Use the following list to identify the lookup codes (QuickCodes) that you need to define for your specific implementation. You can enter them in any order.

To set lookup codes, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Oracle Order Capture Lookup Codes

Lookup Code	Description
*ASO_CONTACT_PROFILE_TYPE	Types of customers. The two seeded values are: Consumer and Business.
*ASO_DEFAULT_ORDER_STATE	The default state of an order when the quote is passed to Oracle Order Management. The seeded values are: entered and booked. Each triggers different Oracle Order Management validation.
*ASO_EXT_VALUE_TYPE	Data type of value for order line attribute. This lookup is used by an Order Capture API for validation of VALUE_TYPE in ASO_QUOTE_LINE_ATTRIBS_EXT.
ASO_FUNCTIONALITY_CODE	Not used in Release 11i.

Lookup codes marked with an asterisk (*) are mandatory.

Oracle Order Capture Lookup Codes (Cont.)

Lookup Code	Description
*ASO_HEADER_RELATIONSHIP_TYPE	Type of header relationships between quote headers. There is one seeded value: Copy. This lookup is used by an Order Capture API for validation of RELATIONSHIP_TYPE in ASO_QUOTE_HEADER_RELATIONSHIPS.
*ASO_ITEM_TYPE	Item types for items which are added to the cart.
*ASO_LINE_ATTRIBUTE_STATUS	Status of an order line attribute. This lookup is used by an Order Capture API for validation of STATUS in ASO_QUOTE_LINE_ATTRIBS_EXT.
*ASO_LINE_ATTRIBUTE_TYPE	Type of order line attribute. This lookup is used by an Order Capture API for validation of ATTRIBUTE_TYPE_CODE in ASO_QUOTE_LINE_ATTRIBS_EXT.
*ASO_LINE_RELATIONSHIP_TYPE	Type of line relationship. This lookup is used by an Order Capture API for validation of RELATIONSHIP_TYPE in ASO_QUOTE_LINE_RELATIONSHIPS.
*ASO_OBJECT_RELATIONSHIP_TYPE	Type of object relationship. This lookup is used by an Order Capture API for validation of RELATIONSHIP_TYPE_CODE in ASO_QUOTE_RELATED_OBJECTS.
*ASO_ORDER_FEEDBACK_CRM_APPS	CRM applications registered for order feedback. All applications listed here are informed of any changes to an order in Oracle Order Management.
*ASO_ORDER_LINE_STATUSES	Status of the order line.
*ASO_ORDER_STATUSES	Order status.
*ASO_PARTY_OBJECT_TYPE	TCA object type (CONTACT_POINT, PARTY_SITE). This lookup is used by an Order Capture API for validation of PARTY_OBJECT_TYPE in ASO_QUOTE_PARTY.
*ASO_PARTY_RELATIONSHIP_TYPE	Type of party relationship. This lookup is used by an Order Capture API for validation of RELATIONSHIP_TYPE_CODE in ASO_PARTY_RELATIONSHIP.
*ASO_PARTY_TYPE	Type of party (Quote_to, Deliver To). This lookup is used by an Order Capture API for validation of PARTY_TYPE in ASO_QUOTE_PARTY.
*ASO_PAYMENT_OPTION	Payment options available to users.

Lookup codes marked with an asterisk (*) are mandatory.

Oracle Order Capture Lookup Codes (Cont.)

Lookup Code	Description
*ASO_PAYMENT_TYPE	Payment types available to users.
*ASO_QUOTE_LINE_ATTRIBS_EXT	Name of an order line attribute. This lookup is used by an Order Capture API for validation of NAME in ASO_QUOTE_LINE_ATTRIBS_EXT.
*ASO_QUOTE_OBJECT_TYPE	Type of object (quote header identifier). This lookup is used by an Order Capture API for validation of QUOTE_OBJECT_TYPE_CODE in ASO_QUOTE_OBJECT_RELATIONSHIPS.
ASO_QUOTE_PARTIES	Not used in Release 11i.
*ASO_QUOTE_RELATED_OBJECTS	Unique identifier of an object. This lookup is used by an Order Capture API for validation of OBJECT_ID in ASO_QUOTE_RELATED_OBJECTS.
*ASO_QUOTE_SOURCE	The source of the quote.
*ASO_RELATED_OBJECT_TYPE	Type of object related to the quote. This lookup is used by an Order Capture API for validation of RELATIONSHIP_TYPE_CODE in ASO_QUOTE_RELATED_OBJECTS.
*ASO_RESERVATION_TYPE	Options the user can use to decide at what level the application reserves an item in inventory.
*ASO_RETURN_FOR	Reasons for returns.
*ASO_SERVICE_TYPE	Service reference type code. A service must always be linked to an item or an item in the customer installed base. This list of values specifies where the item is. Seeded values include: Quote, Order, and Customer Product.
ASO_UNIVERSAL_SEARCH	Types of universal search. Not used in Release 11i.

Lookup codes marked with an asterisk (*) are mandatory.

Setting System Profile Options

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these profile options in any order you like.

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Oracle Order Capture System Profile Options

Profile Option	Description
ASO: Advanced Inbound Installation	Determines if Oracle Advanced Inbound is installed. Not applicable in Release 11i.
ASO: Advanced Outbound Installation	Determines if Oracle Advanced Outbound is installed. Not applicable in Release 11i.
ASO: Automatic ATP Check	Determines whether ATP check is performed automatically for an item in the Item View tab.
ASO: Automatic ATP check for Number of Items	Specifies the number of items in the Related Items window that triggers an automatic ATP check. Users can use this profile to limit the amount of time the application spends performing ATP checks. If the number of related items is less than or equal to the specified number, then the application performs an ATP check. If the number of related items is equal to the specified number, then the application does not perform the check.
ASO: Configurator URL	Enter the URL for the Oracle Configurator window.
ASO: Credit Card Authorization	A flag determining whether the application performs a credit card authorization.
*ASO: Default Currency Code	One of the two profile options that determine the currency of the transactions in the application. The currency defined in ASO: Default Order Type takes precedence over this profile option.
*ASO: Default Order Category	Determines whether all items in an order are orders or returns. By default, this profile is set to orders and cannot be changed in the current release.
*ASO: Default Order State	The default state of the order when the quote is booked. Determines whether or not quote can be booked or entered.
*ASO: Default Order Type	Determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile determines what price list and currency code appears by default in the main Order Capture form.
ASO: Default Ordered Qty in OC UI	The default quantity which appears in the QTY field of the Order Capture window.

* Profile options marked with an asterisk (*) are mandatory.

Oracle Order Capture System Profile Options (Cont.)

Profile Option	Description
ASO: Default Payment Option	Defaults the payment option. Choices are: single, installment, and split.
*ASO: Default Quote Status	Default status of a new quote. When this option is not defined, the default value is Draft.
*ASO: Default Salesrep	The default sales representative who is allocated the sales credits for booked orders when the user is not entered as a sales representative.
*ASO: Default Ship From Org	ATP and reservation checks are done against the organization specified in this profile.
ASO: Enable Configure Model Item	Enables configuration of model items. This profile option is not being used in Release 11 <i>i</i> . In this release, the configurator is enabled by setting the Configurator URL.
ASO: Enable Line Payments	Not used in this release.
ASO: Enable Split Payment	Not used in this release.
ASO: OM Defaulting	When creating an order from a quote, the value of this profile option is checked to determine whether Order Management defaulting logic will be applied for the attributes Order - salesrep_id, order_type_id, payment_term_id, fob_code, freight_terms_code, and shipment_priority_code.
ASO: Order Feedback Queue Retention Time	Amount of time that messages are retained in the order feedback queue.
*ASO: Product Organization	The organization that Order Capture uses to validate inventory items.
*ASO: Quote Duration	The minimum length of time a quote remains valid. The Order Capture window uses this value to calculate the Expiration Date.
ASO: Quote Order Entered State	The state of orders when they are created from quotes. Not used in this release.
ASO: Receipt Method	Determines the receipt method for credit card authorization. This profile option is required when ASO: Credit Card Authorization is set to Yes.

* Profile options marked with an asterisk (*) are mandatory.

Oracle Order Capture System Profile Options (Cont.)

Profile Option	Description
ASO: Reservation Level	Determines the level at which item reservation is done. Items can be reserved either when they are added to the cart or when the order is booked. Manual reservation is not supported in Release 11 <i>i</i> .
ASO: Scripting Installation	Determines if Oracle Scripting is installed. Not used in Release 11 <i>i</i> .
ASO: Use Installation Details	Turns on the Installation Details UI. Not used in Release 11 <i>i</i> .
*ASO: Validate Salesrep	If this profile is set to Yes, then it checks to see the user is set up as a valid sales representative. If it is set to No, then the application uses the default sales representative entered in ASO: Default Salesrep.

* Profile options marked with an asterisk (*) are mandatory.

Workflows in Oracle Order Capture

Oracle Order Capture does not use workflows.

Working with Oracle Order Capture

Once you have set up quote statuses and quote status transitions, lookup codes, and system profile options, Oracle Order Capture is fully implemented.

For a guide to working with Oracle Order Capture, see *Oracle Order Capture Concepts and Procedures*.

